








Producer:	Before the training, make sure to disable waiting room and set all participants to automatically mute when they enter.
	There are multiple breakout room activities scheduled for this session. The first breakout room (pg5, slide 7) can be randomly assigned. For the other breakout rooms (slides 24, 26, 28, 31, 33, 36), collaborate with the Facilitator to determine groupings. Each breakout room will have 2 participants.
	There are Jamboard activities included. Each time the participants use the Jamboard, it will be the same link. However, after each debrief, screenshot the Jamboard to save for the post-training resources and clear it for the next activity.
	When the participants are debriefing how to make an effective call (slides 24, 26, 28, 31, 33, 36), keep another Jamboard and keep notes to be saved for post-training resources.


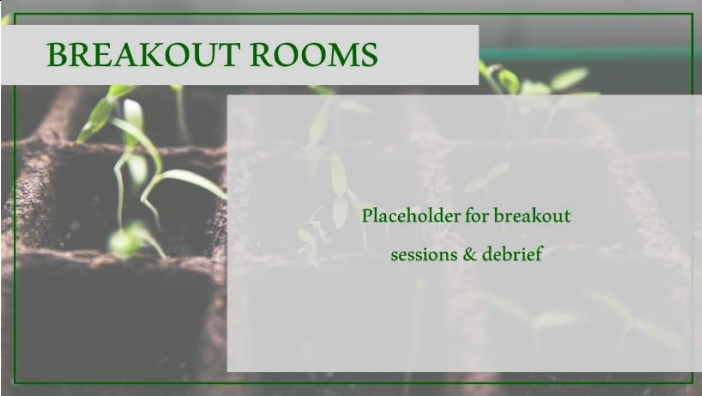
Facilitator:	This training was designed to be given over Zoom. However, it can be easily transferred to an in-person training. Instead of breakout rooms, participants will be partnered up.
	There are multiple breakout room activities scheduled for this session The first breakout room (pg5, slide 7) can be randomly assigned. For the other breakout rooms (slides 24, 26, 28, 31, 33, 36), collaborate with the Facilitator to determine groupings. Each breakout room will have 2 participants. For each breakout room, there are 2 minutes built in at the beginning and end for transitions. Each will have a quick debrief following.
	You will need the powerpoint open and shared with all participants.
	General commentary is included here, but be prepared to address questions, concerns asked by participants.



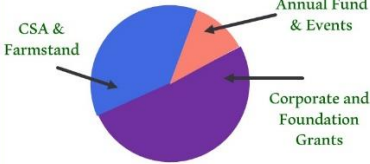

Session 1		
Slides	Approximate Timing	Summary
1-8	45 min	Introductions
9-12	19 min	Fundraising Overview + Game
13-37	4 hrs	How to Effectively Make a Fundraising Call
38-40	5 min	Closing
Total:	5 hrs 9 min	


Slide#/ Duration	Slide	Facilitator Notes	Producer Notes
1 (5 min)	 <hr/> <p>Before we begin....</p> <p>in the chat, type your favorite item from the Bradbury Hill Farm store</p> 	<p>DO [as people join]: Welcome attendees and ask them to follow the prompt on the screen.</p> <p>DO: As people answer, engage in conversation about their choices.</p>	Make sure the facilitator's camera is on and that the PPT is being shared.
2 (1 min)	 <hr/> <p>Volunteer Fundraiser</p> <p>Virtual Training</p>	<p>SAY: Welcome to the Bradbury Hill Farm Volunteer Fundraiser training. We're so excited to have you here to help support our fundraising efforts!</p>	

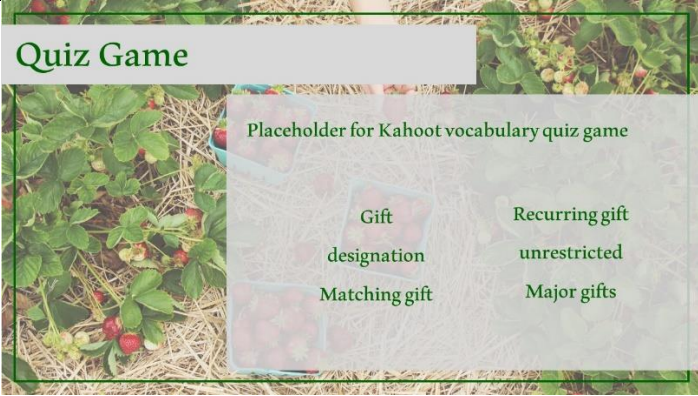
<p>3 (1 min)</p>	<div data-bbox="342 220 810 552"> <h2>Training Agenda</h2> <ul style="list-style-type: none"> Introduction Fundraising Program Overview Volunteer Call Program <ul style="list-style-type: none"> Program purpose and goals Making an effective call Closing and Next Steps </div> <div data-bbox="825 220 1031 552">  </div>	<p>SAY: Today's training will run approximately five hours.</p> <p>[Click] First, we'll meet each other and share our expectations for today, and for the program.</p> <p>[Click] We'll do a quick overview of the Bradbury Hill Farm fundraising program.</p> <p>[Click] Then, we will go over the call program, discuss our goals, and how you can effectively reach donors.</p>	
<p>4 (1 min)</p>	<div data-bbox="342 753 548 1084">  </div> <div data-bbox="562 753 1026 1084"> <h2>Introduction</h2> </div>	<p>SAY: Now, we will have an overview of the farm and programs, and get to know each other!</p>	


<p>5 (1 min)</p>	<div data-bbox="352 207 1016 568"> <div>Our Mission</div>  <p>Bradbury Hill Farm provides access to local produce for all in the Greater Bradbury region.</p> </div>	<p>SAY: The mission of Bradbury Hill Farm is to provide access to local produce in the Greater Bradbury region.</p> <p>We do this through a variety of programs and outreach in the community.</p>	
<p>6 (1 min)</p>	<div data-bbox="352 597 1016 964"> <div>Our Programs</div>  <ul style="list-style-type: none"> Community Supported Agriculture (CSA) Partnerships with food pantries Partnerships with community kitchens </div>	<p>SAY: We provide families in the region with our produce through</p> <p>[click] both CSA and farm stand sales. We also provide free and discounted CSA shares to families in need that have been identified by the Bradbury Department of Social Services.</p> <p>[click] We donate thousands of pounds of food every year to three local food pantries: Help for Home Bradbury, Helping Hands, and FoodCo. These three organizations service almost 10,000 families a year.</p> <p>[click] We also provide significantly discounted produce to 6 community kitchens. These organizations pay between 20-40% of the cost to our farm.</p>	

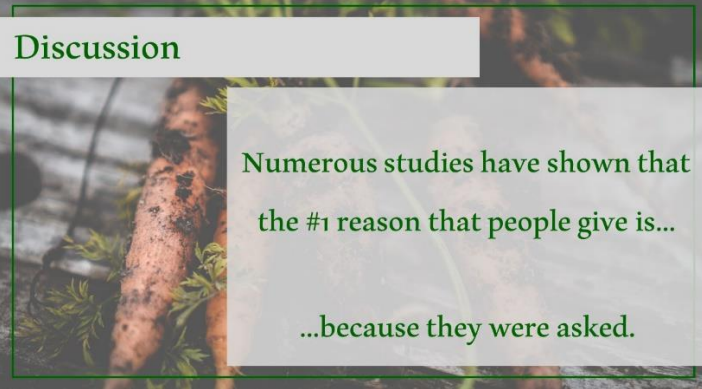

		They not only serve meals to the community, but have a variety of service and training programs to help with job training and skills development.	
7 (15 min)	 <p>Participant Introductions</p> <p>Meet your fellow volunteers!</p> <p>Name</p> <p>Volunteer Experience with Bradbury Hill Farm</p> <p>One thing you most want to learn today</p>	<p>DO: Introduce the activity:</p> <p>Participants will be randomly assigned to breakout rooms. In conversation with their partner, they should share their names, their experiences volunteering with Bradbury Hill Farm, and something they're most wanting to learn at this training.</p> <p>EXPLAIN: All breakout rooms will close after 10 minutes, and then everyone will debrief.</p>	<p>Breakout room #1.</p> <p>These can be randomly assigned, and each room should have two people.</p> <p>Prior to opening the breakout room, set the time for 10 minutes.</p>
8 (20 min)	 <p>BREAKOUT ROOMS</p> <p>Placeholder for breakout sessions & debrief</p>	<p>DO [once participants have all returned]: Facilitate sharing from each pair for about 15 minutes. Have them introduce each other to the rest of the group.</p>	


<p>9 (1 min)</p>	 	<p>SAY: Now, we're going to give you some background information on the Bradbury Hill Farm fundraising program.</p>	
<p>10 (3 min)</p>	<p>Overview</p> <p>🌿 Bradbury Hill Farm has an annual budget of approximately \$500,000.</p>  	<p>EXPLAIN: Bradbury Hill Farm has an annual budget of approximately \$500,000. This includes salaries, land payments, seeds, water, equipment maintenance and repair, transportation, and other expenses the farm incurs annually.</p> <p>SAY: The revenue to cover these expenses comes from multiple sources.</p> <p>[click] approximately 33% of funding comes from the CSA, farm stand, and the discounted payments from the community kitchens.</p> <p>[click] just over half of our revenue comes from grants that we receive from corporations and foundations, as well as some state and federal funding sources.</p>	

		<p>[click] the rest of our funding comes from our annual fund and events, and this is where we need your help!</p>	
<p>11 (5 min)</p>	 <p>The graphic titled "Fundraising Goals" features a background image of strawberry plants. It lists the "Annual Fund & Events" goal as \$150,000 and includes a bulleted list of fundraising methods: Individual Gifts (one-time, monthly, recurring), Matching Gifts, Percentage donation programs, Annual Farm Festival, and Silent Auction.</p>	<p>EXPLAIN: The different funding sources that fall under the annual fund and events:</p> <p>[click] Individual gifts – gifts from individual donors. Can be one-time gifts, but can also be monthly or recurring on any schedule. These gifts can also be used for our general unrestricted fund (which means BHF can use it in the area of greatest need) or the donor can “restrict” or “designate” the gift towards a specific program or expense.</p> <p>Donors who make gifts of \$500 or more are noted as “major donors” in our database.</p> <p>[click] Matching gifts – when an individual makes a gift, some employers will match that gift 100%.</p> <p>[click] Percentage donation programs – things like Amazon Smile, sales of grocery bags at the supermarket,</p>	

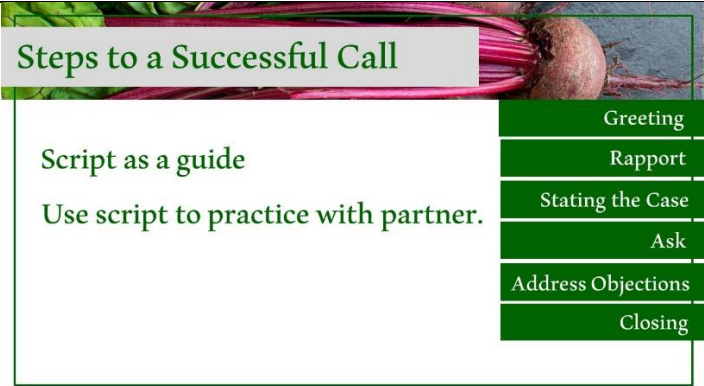

		<p>restaurant fundraisers, and other ways we make a percentage of sales.</p> <p>[click] Our Annual Farm Festival happens every year in March, and we raise money through ticket prices, a paddle raise, and</p> <p>[click] the silent auction. Our event committee helps to solicit items from local businesses, and we put them together in packages for auction during the Farm Festival. However, donors are not noted as major donors when they spend more than \$500 at the Farm Festival or Silent Auction.</p>	
12 (10 min)		<p>SAY: Now, we're going to just play a quick game to see which of these terms you know best and which ones we will want to review later!</p> <p>EXPLAIN: How the game works. How they will click the link, add the code, and how answering occurs.</p> <p>EXPLAIN: Address any confusion or terms that seem to not be understood well as the game is being played.</p>	<p>Put the Kahoot link and Kahoot code into the chat</p> <p>Make sure everything is ready for the game.</p>



<p>13 (1 min)</p>	 <div data-bbox="562 224 1033 557"> <h2>Volunteer Call Program</h2> </div>	<p>SAY: Now, we're going to look at the volunteer call program specifically!</p>	
<p>14 (1 min)</p>	<div data-bbox="344 613 1033 984"> <h3>Discussion</h3> <p>Click the Jamboard link in the chat</p> <p>Respond: Why do you give to Bradbury Hill Farm?</p> </div>	<p>SAY: You will click the Jamboard link in the chat. Type your answer onto the board. We can all see your answers, but they are all anonymous.</p>	<p>Add the Jamboard link into the chat.</p>
<p>15 (15 min)</p>	<div data-bbox="344 1016 1033 1386"> <h3>Discussion</h3> <p>Placeholder for answers and discussion</p> </div>	<p>DO: Share any of the responses with the group. Invite any participants to elaborate on their thoughts. Address any concerns or misconceptions that may arise in the notes.</p>	<p>When the discussion is over, take a screenshot of the Jamboard and clear it for the next activity.</p>




<p>16 (1 min)</p>		<p>SAY: Thank you all for sharing your thoughts.</p> <p>According to multiple research studies, the #1 reason that people give is</p> <p>[click] because they were asked. And that's what we're doing here. We want to not only invite people to support our organization, but also to let them know where their donations help and how they're used. Many of our CSA members don't actually know that we have all the other programs (including our Fall Festival), so this is also a chance for us to engage with them and share information.</p>	
<p>17 (3 min)</p>		<p>Explain: The purpose of the volunteer call program is</p> <p>[click] engagement. This is both for you, the volunteer, and the prospective donor we're calling. It's about building a community of supporters and people interested in our mission and connecting them with each other.</p> <p>[click] Stewardship is vital. We want to say thank you to everyone who supports us. Whether they make additional</p>	



		<p>donations or not, CSA members help support the farm, and we want them to know that. For those that do want to give additional gifts, sharing with them where the money has gone and what programs have been supported is also important.</p> <p>[click] And of, course, we want to raise as much money as we can.</p>	
<p>18 (5 min)</p>	<div> <div>Preparing to Call</div> <div> <ul style="list-style-type: none"> Review donor file Attributes Last gift (date & amount) </div> </div> 	<p>EXPLAIN: There is a sample donor file list in the participant guide. Ask them to turn to the correct page.</p> <p>EXPLAIN: How to read the donor file. Point out all the information and what we can tell about the donor.</p> <p>EXPLAIN: What attributes are (and to view the sample list in their participant guide), and how to analyze the list of gifts made.</p>	




19 (5 min)	<div>Discussion</div> <div>Click the Jamboard link in the chat</div> <div>Respond: What can we learn about each donor before you call?</div>	DO: Assign each participant one of the three additional donor samples and ask them what they know about the donor just by looking at the file.	Add the Jamboard link into the chat.																								
20 (1 min)	<div>Discussion</div> <div><div><div><div><div>Name: Sandra Main</div><div>Phone Number: (123) 456-7890</div><div>Email: Sandra.main@email.com</div></div><div>Attributes: Volunteer, CSA Member</div></div><table><thead><tr><th>Gift Date</th><th>Gift Amount</th><th>Gift Allocation</th></tr></thead><tbody><tr><td>03/15/21</td><td>\$250</td><td>Farm Festival Auction</td></tr><tr><td>02/28/21</td><td>\$75</td><td>Farm Festival Tickets</td></tr><tr><td>06/08/20</td><td>\$25</td><td>Annual Fund</td></tr></tbody></table></div><div><div><div><div>Name: Sam and Miriam Chavez</div><div>Phone Number: (987) 654-3210</div><div>Email: Chavez.family@email.com</div></div><div>Attributes:</div></div><table><thead><tr><th>Gift Date</th><th>Gift Amount</th><th>Gift Allocation</th></tr></thead><tbody><tr><td>12/15/20</td><td>\$25</td><td>Annual Fund</td></tr><tr><td>11/15/20</td><td>\$25</td><td>Annual Fund</td></tr><tr><td>10/15/20</td><td>\$25</td><td>Annual Fund</td></tr></tbody></table></div></div>	Gift Date	Gift Amount	Gift Allocation	03/15/21	\$250	Farm Festival Auction	02/28/21	\$75	Farm Festival Tickets	06/08/20	\$25	Annual Fund	Gift Date	Gift Amount	Gift Allocation	12/15/20	\$25	Annual Fund	11/15/20	\$25	Annual Fund	10/15/20	\$25	Annual Fund	DO: Ask the participants how they might approach the call with each donor. How might the conversations be different?	
Gift Date	Gift Amount	Gift Allocation																									
03/15/21	\$250	Farm Festival Auction																									
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21 (15 min)	<div>Discussion</div> <div>Placeholder for answers and discussion</div>	DO: Facilitate the discussion.																									

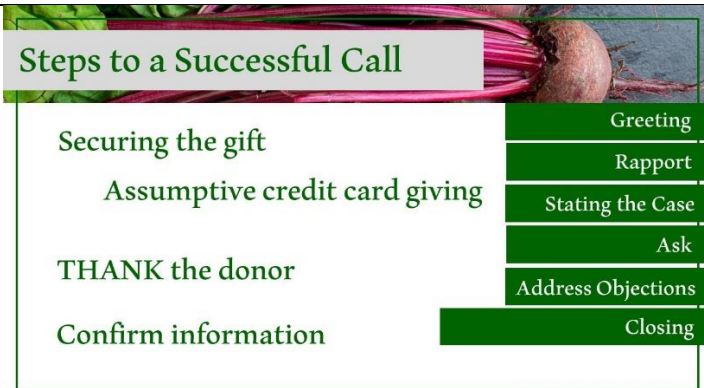

<p>22 (3 min)</p>	 <p>Script as a guide</p> <p>Use script to practice with partner.</p> <ul style="list-style-type: none"> Greeting Rapport Stating the Case Ask Address Objections Closing 	<p>DO: Direct participants to turn to the script page in their guide.</p> <p>EXPLAIN: The script is a guide for how a call should flow. Callers can absolutely use it in the beginning, but with time, it will be easier to make calls without it.</p> <p>EXPLAIN: That you will be looking at each section of the call and practicing with a partner. The process will be that everybody will be put into a breakout room with a partner for 5 minutes (the same partner each time). Each person in the pair will each take a turn as the caller to get the practice in that role. Then, everyone will come back to debrief for 5 minutes.</p>	
<p>23 (3 min)</p>	 <p>Introduce yourself and your role.</p> <p>Ask for the donor.</p> <p>THANK for past support.</p> <ul style="list-style-type: none"> Greeting Rapport Stating the Case Ask Address Objections Closing 	<p>EXPLAIN: The greeting part of a call includes: introducing yourself and your role, asking to speak to the donor, and thanking them for their past support.</p> <p>Note that they should review the attributes. If there are no gifts made, but they are a CSA member, thank them for their support through the CSA program.</p>	


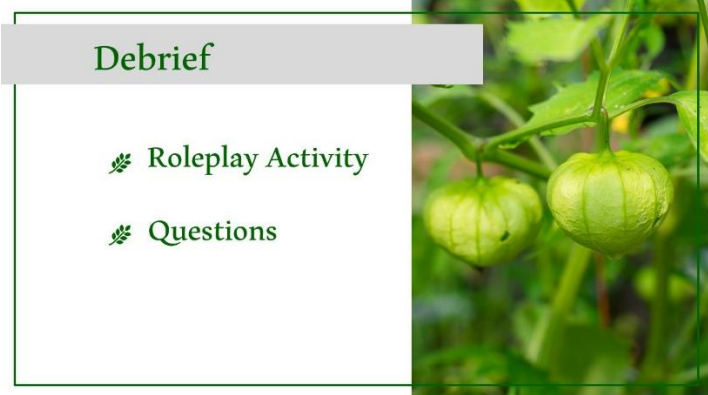

<p>24 (20 min)</p>	 <p>Steps to a Successful Call</p> <p>Breakout Rooms: Practice greetings</p>	<p>EXPLAIN: Everyone will practice the greeting (using the script) with their partner.</p> <p>-----</p> <p>When the breakout rooms close, facilitate the discussion about how the greeting went and how it felt.</p>	<p>Breakout Room #2: Add all participants to their breakout rooms.</p> <p>Set timer for 5 minutes.</p> <p>After, add reflection notes to a private Jamboard.</p>
<p>25 (3 min)</p>	 <p>Steps to a Successful Call</p> <p>Ask donor questions.</p> <p>Share your experiences.</p> <p>Share updates or upcoming events.</p> <p>Greeting</p> <p>Rapport</p> <p>Stating the Case</p> <p>Ask</p> <p>Address Objections</p> <p>Closing</p>	<p>EXPLAIN: The rapport part of a call includes: asking the donor questions about their experiences at BHF, sharing your own common experience, and sharing updates or upcoming events (provided in the script).</p> <p>Note that this piece is all about getting to know the donor and learning more about them. This can help give you a link later when you're asking them to make a gift.</p>	



<p>26 (20 min)</p>		<p>EXPLAIN: Everyone will practice the rapport (using the script) with their partner.</p> <p>-----</p> <p>When the breakout rooms close, facilitate the discussion about how the rapport went and how it felt. Note that everyone will have a different approach, and that's ok!</p>	<p>Breakout Room #3: Add all participants to their breakout rooms.</p> <p>Set timer for 5 minutes.</p> <p>After, add reflection notes to a private Jamboard.</p>
<p>27 (3 min)</p>		<p>EXPLAIN: The stating the case part of a call includes explaining what BHF does with fundraised monies and how giving impacts the communities we serve.</p> <p>Note that this piece is really about showing the impact of BHF and how their gifts will help support that.</p>	
<p>28 (25 min)</p>		<p>EXPLAIN: Everyone will practice the stating the case (using the script) with their partner.</p> <p>-----</p> <p>When the breakout rooms close, facilitate the discussion about how the stating the case went and how it felt.</p>	<p>Breakout Room #4: Add all participants to their breakout rooms.</p> <p>Set timer for 10 minutes.</p> <p>After, add reflection notes to a private Jamboard.</p>

<p>29 (1 min)</p>	 <p>The diagram titled "Steps to a Successful Call" features a background image of red chard. It lists three main steps on the left: "ASK!", "Ask for donors to increase or renew their gifts.", and "Ask multiple times.". To the right of these steps is a vertical stack of six green boxes representing the call process: "Greeting", "Rapport", "Stating the Case", "Ask", "Address Objections", and "Closing". The "Ask" box is highlighted with a thick green bar behind it.</p>	<p>EXPLAIN: The ask part of a call includes just asking for a gift. There are tiered approaches, outlined in the script.</p> <p>Note that it is important to ask and then pause to give the prospective donor time to think about it.</p>	
<p>30 (5 min)</p>	 <p>This diagram, also titled "Steps to a Successful Call" with a red chard background, lists three specific ask types on the left: "First ask: Increase", "Second ask: Renewal", and "Third ask: Participatory". To the right is the same vertical stack of six green boxes as in the first diagram: "Greeting", "Rapport", "Stating the Case", "Ask", "Address Objections", and "Closing".</p>	<p>EXPLAIN: Part of the ask is that donors may say no, but you can ask them again, at a lower dollar amount. In this way, the ask/addressing objections can be repeated a few times within a call.</p> <p>EXPLAIN: Tiers are outlined in their participant guide.</p> <p>A gift increase would be at the level one higher than their last gift.</p> <p>A gift renewal would be giving the same amount as their last gift.</p> <p>A participatory gift would be giving an amount that is less than their last gift amount, but significant in some way. For example: asking \$18.75, to represent 1875, the year the farm was first founded. Some ideas are also listed in the participant guide.</p>	

<p>31 (25 min)</p>		<p>EXPLAIN: Everyone will practice the ask (using the script) with their partner.</p> <p>-----</p> <p>When the breakout rooms close, facilitate the discussion about how the stating the case went and how it felt.</p>	<p>Breakout Room #5: Add all participants to their breakout rooms.</p> <p>Set timer for 10 minutes.</p> <p>After, add reflection notes to a private Jamboard.</p>
<p>32 (3 min)</p>		<p>EXPLAIN: Donors may object to your ask for a variety of reasons. While we don't want to force or guilt donors into making gifts, we want to address their objections however we can.</p> <p>EXPLAIN: Common objections and ways to address them are in the participant guide.</p>	
<p>33 (25 min)</p>		<p>EXPLAIN: Everyone will addressing objections with their partner. The partner who is roleplaying the donor should choose one objection from the list of ones commonly given.</p> <p>-----</p> <p>When the breakout rooms close, facilitate the discussion about how the</p>	<p>Breakout Room #6: Add all participants to their breakout rooms.</p> <p>Set timer for 10 minutes.</p> <p>After, add reflection notes to a private Jamboard.</p>

		addressing objections went and how it felt.	
34 (1 min)	 <p>Steps to a Successful Call</p> <ul style="list-style-type: none"> Securing the gift <ul style="list-style-type: none"> Assumptive credit card giving THANK the donor Confirm information <p>Process Flow:</p> <ul style="list-style-type: none"> Greeting Rapport Stating the Case Ask Address Objections Closing 	<p>EXPLAIN: Closing the call is important regardless of whether the donor chose to make a gift. It's important to thank the donor (for their gift or time), and to confirm all of their contact information.</p>	
35 (15 min)	 <p>Putting it all together</p> <p>Volunteer for roleplay</p> <p>Be prepared to share your thoughts!</p>	<p>SAY: Now, I'd like a volunteer to practice going through an entire call with me. I will be the prospective donor, and the volunteer will be the caller.</p> <p>DO: Roleplay through an entire call.</p> <p>DO: Debrief with the entire group.</p>	

<p>36 (30 min)</p>		<p>EXPLAIN: Everyone will roleplay with a partner. Each pair will practice twice. One as the prospective donor, one as the caller. Then, they will switch.</p>	<p>Breakout Room #7: Add all participants to their breakout rooms.</p> <p>Set timer for 20 minutes.</p>
<p>37 (10 min)</p>		<p>DO: Facilitate a debrief of the roleplay activity.</p> <p>DO: Answer any questions or resolve any concerns by the learners.</p>	<p>Keep notes on a Jamboard.</p> <p>Once the debrief has concluded, screenshot all the Jamboard pages with notes to be included in a post-training email/resource.</p>
<p>38 (1 min)</p>		<p>SAY: That concludes our training today. We'll talk about what happens next.</p>	

<p>39 (3 min)</p>	<div data-bbox="352 203 1037 581"> <div data-bbox="352 203 814 276">Upcoming Dates</div> <div data-bbox="441 337 730 444"> <ul style="list-style-type: none"> 🌿 Online Practice 🌿 Fall Calling Session </div> <div data-bbox="772 191 1037 586">  </div> </div>	<p>EXPLAIN: All learners will receive an email with the powerpoint, the Jamboard debrief notes, and an online practice module where they can practice working through a variety of calls.</p> <p>EXPLAIN: The upcoming dates for a fall calling session.</p>	
<p>40 (1 min)</p>	<div data-bbox="533 630 835 763">  </div> <hr data-bbox="363 787 1024 790"/> <p data-bbox="569 833 819 867">THANK YOU!</p>	<p>SAY: Thank you for joining us today!</p>	